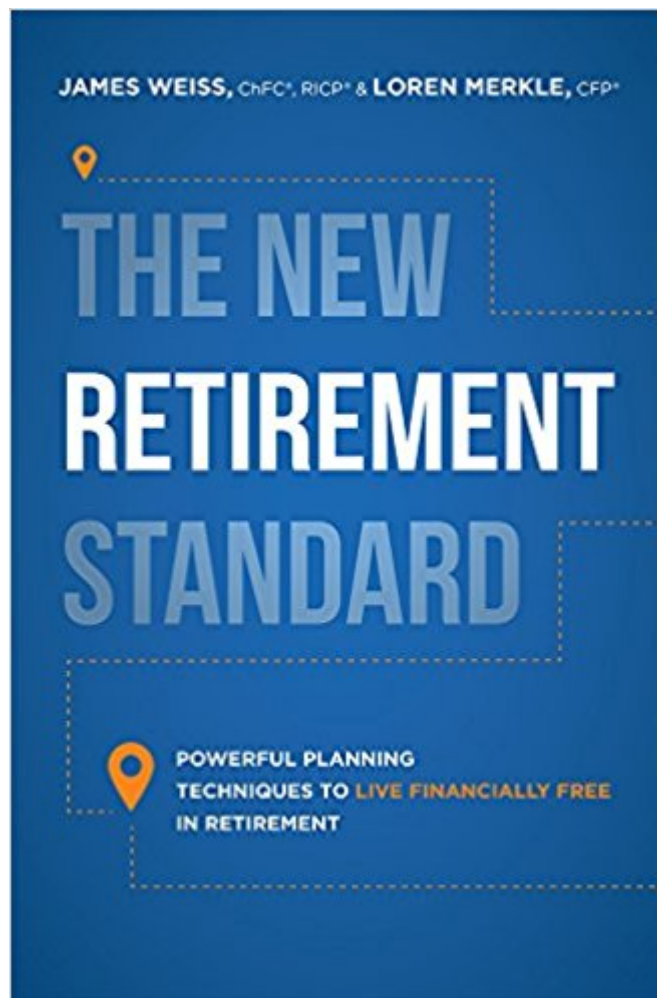




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# The New Retirement Standard: Powerful Planning Techniques To Live Financially Free In Retirement



## Synopsis

ARE YOU PREPARED FOR YOUR RETIREMENT VOYAGE? If you're taking a vacation to Europe, you'll probably make a plan. You might book a flight, reserve hotel rooms, make travel arrangements, and create an agenda to ensure a successful trip. But why plan so much for a vacation and not for your retirement? A financial plan is your roadmap to retirement, and in *The New Retirement Standard*, financial planning professionals James Weiss and Loren Merkle share how you can craft a plan to protect your wealth and maximize your resources. You'll learn how to build a team of experts, handle taxes, manage risk, preserve your legacy, and ultimately follow your retirement roadmap to prosperity.

## Book Information

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## Customer Reviews

James Weiss is a Chartered Financial Consultant® and cofounder of Weiss-Merkle Financial LLC, with more than fourteen years of financial planning experience. He also received a bachelor of science degree in finance from Upper Iowa University as well as a master's degree in financial planning and services from the American College. James lives in Johnston, Iowa, with his wife and two children. Loren Merkle is a CERTIFIED FINANCIAL PLANNER® and cofounder of Weiss-Merkle Financial LLC, with over seventeen years' experience. He obtained his bachelor's in business administration and management from Central College. Loren is passionate about mentoring others down a path to financial freedom.

The book is an easy read without too much financial jargon. It is for those planning for retirement in

the distant future or right away and for those already retired. It is designed to help people put together the parts of a retirement plan that generate financial peace of mind for the retiree. It isn't filled with footnotes, meaningless proofs or secrets of how to make a financial killing. It directs the retiree not only on retirement income but also on what satisfies the retiree's spending needs. It shows how and what to save and accumulate, how to minimize losses and costs and how to make the most of what you have. It is a little like a financial version of the tortoise and the hare. I read this book after the fact of retirement and it has been a confirmation of what my wife and I have done. I believe what it has to say and even learned some things I never knew before. Doug & Bonnie Smalley

This is a great book for people who have put off planning for retirement and don't know how to start the process. It also guides you through the different types of financial planners you should be working with. I could relate to some of the examples of investment strategies that were wrong for people getting close to retirement age. I don't think you can read this book and not gain valuable knowledge about how, when and who to work with when planning for your retirement. I'm not sure who this quote came from but I think it pertains to the message in this book. " People don't plan to fail but fail to plan." If you read this book you will easily relate to some of the confusion people go through when thinking about retirement. I wish I would have read this book 10 years ago, I could have eliminated some of mistakes made in my retirement strategies.

Easy read and understand

Takes some of the fear out of thinking about retirement by empowering me with easy to understand information. I am no financial wiz but they speak to me in a way I can understand. Thanks!!!!

Easy to read guideline for financial success through planning for your retirement. Provides concise steps that should be followed by those looking to reduce risk as we move closer to retirement years.

Great book by a couple of dynamic leaders in the industry.

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